



# Company Info And vision

**Credit Objects PTY LTD** is renowned for providing top-notch software for the Asset Finance & Insurance industry. Our mission is to support our clients in achieving substantial growth as lenders, insurers, and finance brokers. We offer comprehensive solutions with a team of highly qualified and experienced experts ready to tackle any challenge. Currently, we are enjoying positive and profitable business relationships with our valued customers.

**Credit Objects PTY LTD** offers software solutions that deliver exceptional value to our customers. Our solutions are built from the ground up, meticulously considering the intricate and evolving requirements of the asset finance industry driven by regulatory compliance and technological advancements. We provide robust solutions designed to meet and exceed the needs of the asset finance industry, regardless of your role within it.

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## ORION – BROKER PLATFORM



### Credit Object's ORION – Broker Platform – Point of Sale

The POS module within the ORION - Broker Platform streamlines the loan origination process, enabling brokers to efficiently manage and process loan applications. It integrates seamlessly with various sales channels, allowing real-time data capture and processing. This module ensures a smooth and user-friendly experience for both brokers and borrowers, enhancing overall customer satisfaction and operational efficiency.

### CREDIT OBJECTS (PTY) LIMITED

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❖ Workbasket

The Workbasket functionality in ORION serves as a centralized task management system. It allows users to organize, prioritize, and track their tasks related to loan processing. With configurable views and filtering options, users are able to customize their workbaskets to align with their workflow, ensuring no tasks are overlooked and improving productivity. Users are able to perform precise and comprehensive searches across multiple data fields, ensuring they can access the necessary information without delay. The workbasket’s data is displayed as per the Access Level of the user. This functionality ensures robust security and control within the ORION platform. Administrators can define and manage user access levels, ensuring that sensitive information is only accessible to authorized personnel. This feature helps maintain data integrity and compliance with regulatory standards.

| App No | User     | User Status | Uplink Time | Finance Program | Fin Amount | Item | Lead | Status | Action Item | Finance Company | Access Date |
|--------|----------|-------------|-------------|-----------------|------------|------|------|--------|-------------|-----------------|-------------|
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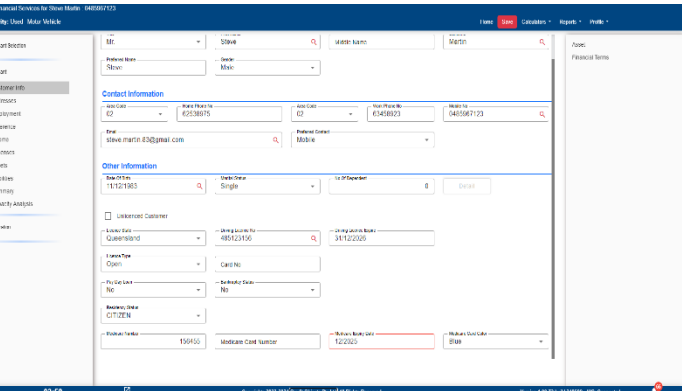


❖ Integrations

The ORION - Broker Platform POS module supports robust third-party integrations, enhancing its functionality and efficiency. It seamlessly integrates with eDoc services, allowing for the electronic signing and management of documents, which streamlines the documentation process. Asset Verification tools are integrated to authenticate the value and ownership of collateral assets, ensuring accuracy and reducing risk. ID Verification services are incorporated to validate borrower identities quickly and securely, minimizing fraud. Additionally, the platform connects with Bank Statement services, enabling automatic retrieval and analysis of bank statements to verify income and financial stability. These integrations collectively ensure a smoother, more reliable loan processing experience.

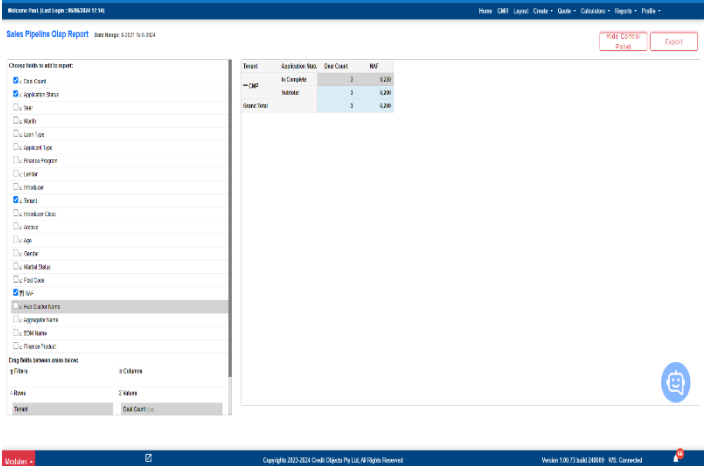
❖ Quote

The Quote module provides brokers with tools to generate accurate loan quotes based on borrower information and lending criteria. This ensures that potential borrowers receive clear and competitive loan offers, enhancing the likelihood of loan acceptance. The Options feature in ORION allows brokers to offer borrowers various loan options based on their needs and eligibility. This flexibility ensures that borrowers can choose the loan product that best fits their financial situation, improving customer satisfaction and loan conversion rates.



❖ Reports

The Reports functionality provides robust reporting tools that help users generate detailed reports on various aspects of the loan origination process. This includes sales pipeline, statement of account, and workbasket reports. The Sales Pipeline report helps users track and manage their loan application pipeline. The Statement of Account report provides borrowers with detailed statements of their loan accounts.



❖ Notification

The Notification feature ensures timely communication of important updates and alerts. Users receive notifications about critical events, such as application status changes or upcoming deadlines, ensuring they stay informed and can take prompt action.

❖ Action Item

The Action Item functionality helps users manage and track tasks that need attention. It ensures that important tasks are highlighted and followed up on, improving task management and accountability within the loan origination process.

❖ Communication

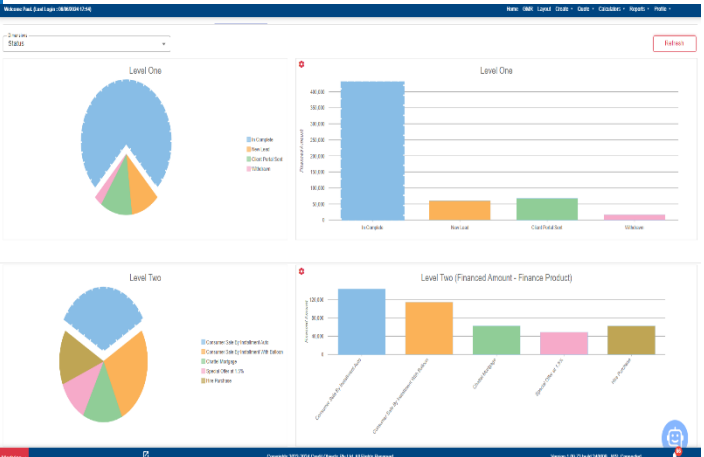
ORION's Communication functionality facilitates effective communication between brokers and borrowers. It supports various channels, including email, SMS, and in-platform messaging, ensuring clear and timely interactions throughout the loan process.

❖ Calculators

ORION's Broker platform provides multiple types of the calculators that offers various financial calculators to assist brokers and borrowers in evaluating different loan scenarios. This includes repayment calculators, capacity calculators, and income calculators, providing valuable insights that aid in decision-making.

❖ Dashboard

The Dashboard provides users with a comprehensive overview of key metrics and activities. It offers real-time insights into loan origination status, performance indicators, and other critical data, helping users make informed decisions and monitor progress effectively.





## ORION – Point of Sale As Whole

- ❖ The ORION - Broker Platform POS Module excels in efficiency and functionality, serving as a crucial tool for modern brokers.
- ❖ Configurable Workbasket for streamlined task management.
- ❖ Comprehensive customer information includes personal and financial details for thorough borrower assessments.
- ❖ Capacity Analysis feature provides accurate evaluations of customer finances to enhance decision-making.
- ❖ Well-defined customer onboarding methods and AI Assistant simplify data input and improve user experience.
- ❖ Seamless third-party integrations enhance verification and processing.
- ❖ Effective communication tools ensure clear, timely interactions for a robust, user-friendly loan origination platform.

## Why Choose ORION – Broker Platform?

